

Exhibit A
Office of the Assessor
Property Tax Administration Program
Estimated Grant Allocation

Calendar Year 2002

Carry over from Year 2001	\$100,000
Loan Amount	\$2,139,938
Estimated Interest	\$40,000
Total	\$2,279,938

Funded Positions

Appraiser Technician (5)		
Appraiser I (4)		
Auditor-Appraiser II (6)		
Automated Systems Analyst I (2)		
Automated Systems Analyst II (1)		
Automated Systems Technician (1)		
Clerk II (1)		
Clerk III (5)		
Assessor Project Specialist (1)		
Fiscal Clerk II (1)		
Secretary I (1)		
Staff Analyst I (1)		
Dept. Information Systems Manager (1)		
Sub-total Funded Positions	30	\$1,532,989

Automation Costs

Hardware/Software, Upgrades, Replacements	\$115,000
Mainframe Programming and Maintenance	\$250,000
Sub-Total Automation Costs	\$365,000

General Expenses

Workstations/Facility Modification/Upgrades	\$40,000
Services and Supplies	\$307,949
Auditor Expense (Audit Program)	\$6,000
Temporary Help	\$25,000
Training	\$3,000
Sub-Total General Expenses	\$381,949

Total Allocation

	\$2,279,938
Less Carryover to Year 2003	-\$100,000
	\$2,179,938

No tasks or associated costs have been identified by the Tax Collector or Auditor/Controller for their use of these funds.

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Grant funds are used to strengthen Assessor operations by supplementing resources as well as improving/enhancing the Property Information Management System. Historically, these funds have proven to be invaluable. The additional resources and automated system improvements funded by the program have facilitated significant reductions in the workload backlogs, therefore expediting increases in the Assessor's roll values and timely collection of tax revenue. This ultimately benefits the state school system and local government. The following is a summary of the tasks performed:

Funded Positions

- Valuations – Several of the staff (e.g., Appraisers, Appraiser Techs, Auditor Appraisers) funded by the Property Tax Administration Program directly participate in the valuation of property. The addition of these employees allows for the assessment of real and business/personal property, which helps in the elimination of backlogs. These individuals directly affect the roll value and create additional state funds through the collection of property taxes.
- Data Systems – The Property Information Management System (PIMS) was developed to increase operational efficiency by creating tools for all aspects of the Assessor's Office. Enhancements to the system through continuous process improvement initiatives have allowed the valuations and assessment services staff to perform their tasks more effectively. The addition of staff (e.g., Automated Systems Analysts and Department IS Manager) to identify and develop new features/functionality, define business rules, coordinate activities of the development team, etc., provides the ability for all Assessor staff to complete their tasks more expediently.
- Administrative/Clerical Support – Several clerical staff have been added as the result of the PTAP. These individuals provide administrative assistance to the valuations and assessment services staff in order to allow them to focus on the processes necessary to efficiently perform their tasks.

Automation Costs

- Hardware/Software replacements/upgrades – Technology is evolving at a rapid pace. Aging equipment, subject to failure, inhibits the staff in performing their regular duties in a timely manner. Several of the software/hardware assets are 5 to 7 years old. The PTAP funds are being utilized to bring the equipment/software up to current standards.
- Programming and Maintenance – Several projects are currently in process or are planned in the next year. The following is a sample list of projects:
 - Permit tracking capabilities
 - Automated imaging workflow
 - Batch mass address change
 - Criteria parcel searches

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General Expenses

- Facility modifications/workstations – The current space utilized by the Data Systems staff is insufficient. Additional space has become available to rectify this situation.
- Services and Supplies – With the addition of staff and equipment, supplementary funds need to be expended to support these functions.
- Auditor Expense – As per the contract, the Assessor's Office is required to have the Auditor-Controller validate the calculations utilized in verifying compliance with the performance criteria specified.
- Temporary Help – Occasionally it is necessary to hire additional clerical help to assist in Assessor operational tasks such as sorting Business Property Statements, roll processing data entry, filing, answering public inquiries, etc.
- Training – Keeping the staff up to date on pertinent issues relative to their positions is important. These funds are utilized both for keeping staff informed on the changes in the laws as well as the changes in technologies.

Exhibit B
AB589
Property Tax Administration Program
Whole Office Approach - All Categories

All Categories of Change:

2002

Added Value

Supplemental Value Added (By Transfers & New Construction)	7,105,438,323
Audits (Mandatory & Non-Mandatory)	509,609,759
Proposition 8's – Restore Project	2,021,902,793
Business Total (All Personal Property & Fixtures-Secured & Unsecured)	9,034,944,420
Assessment Appeals Board (AAB)*	<u>3,302,698,549</u>
Total Changed Value	21,974,593,844

1% Tax Revenue	219,745,938
Assessor PTAP% **	<u>16.93%</u>
	37,202,987
School's Share %	<u>45.5%</u>
	<u>16,927,359</u>

Summary:

School's Share of Added Value	16,927,359
PTAP Grant Amount	<u>-2,139,938</u>
State General Fund Gain	14,787,421

* The difference between Taxpayer's Opinion of Value & AAB's Final Value

** Property Tax Administration Program Percentage Calculation:

PTAP Grant Amount	2,139,938
Assessor's Budget	12,872,765
Assessor's PTAP Percentage (Grant Amount/Budget)	16.93%